Iowa Student Identifier/Locator System

WEB APPLICATION:
UNIQUE STUDENT ID [STATE ID]

eScholar Uniq_id System version 2.1©™

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ABOUT THIS MANUAL

This manual is designed to be used as a reference guide to help the user in using the Iowa Department of Education "State ID" web application. This application will help the user to:

- Assign a unique statewide student identifier for every school student in pre-kindergarten, kindergarten, elementary and secondary public education in the state. This identifier is called as Iowa Student Number [ISN].

- To identify and locate a student from the statewide "ISN Locator Database" either using the ISN or the basic details of a student like Last Name and First Name.

This application is also called as "State ID System".

This manual includes extra space on each page for the user to make notes. We have also included some notes and tips that are designed to highlight important topics.

QUESTIONS:

For questions about the "State ID" web application, please contact:
Carla Schimelfenig by email at Carla.Schimelfenig@ed.state.ia.us
or phone (515) 281-3111, or
Betsy Lundy by email at Betsy.Lundy@ed.state.ia.us
or phone (515)281-3214.

To make it easier for the user to find information in this manual, each topic begins on a new page.

NOTE: *This box will mention things that require special attention. The symbol in the left column indicates an important note to remember.*

TIP: *This box will include useful advice as the user work through the System. The pointing hand always indicates a "TIP".*

IMPORTANT TERMS

A number of terms will be used throughout this manual that may be unfamiliar to the user. Take a minute to review these important terms before beginning:

Term	Meaning
Batch File	An Operating System file that will contain a group of student records in a pre-defined format. Four different types of batch files are used in the "State ID System". They are: 1. Input "Student Info" file 2. Output "IDs Assigned" file 3. Output "Errors to Fix" file 4. Output "Near Matches/Duplicates to Resolve" file Refer to "Input and Output Files Interfaces" section at the end of this document for more information about these types of files.
DE	Iowa Department of Education
Edit	An action to be performed by the user for fixing any data validation errors in the input student record before the ID assignment process. Users will be in a position to fix these errors using "State ID System" online screen interface.
Error	Incorrect / incomplete / missing information in the input student data identified by the "State ID System" validation process. Errors on the input records need to be fixed before creating ID for a student.
Gender	Indicates the gender of the students being reported, either Male or Female
ID	Same as ISN
Identifier	A number that represents an individual
ISN	Iowa Student Number; a 10 digit state-assigned Identifier for every PK-12 public school student in the state
ISN Locator Database	The database used by the Iowa Student Identification/Locator System. This database includes the ISN and student identifying information.

ISN Locator System	The software, processes, and documentation that allow for the location and assignment of the ISN.
Match Probability	A fractional value (less than 1) that represents the matching level of a pair of student records. "State ID System" gives this value as the outcome of matching a pair of student records using probabilistic methods
NCLB	The No Child Left Behind federal legislation signed into law on January 8, 2002.
Near Match	Match probability that falls in a given range. This range is lower than the "Duplicate" range. Example: All matching outcomes reported with a Match Probability value between 0.4 to 0.9 may be considered as "Near Match"
Duplicate	Match probability that falls in a given range. This range is higher than the "Near Match" range. Example: All matching outcomes reported with a Match Probability value between 0.9 to 0.9999 may be considered as "Duplicate"
Probability of Match	Same as Match Probability
PK-12	Grades pre-kindergarten through 12th.
Radio Button	A screen interface in most applications that allow a user to choose only one choice from a group of many choices.
Status Column	The column that normally appears in most of the screens in the "State ID System", that displays the current status of a batch
State ID	Same as ISN
Student Information System (SIS)	A software application that administers and maintains student information in a school / school district, such as Enrollment, Scheduling, Attendance, Accounting and Grade reporting.
Unique Student ID	An identifier used for only one individual student. Same as ISN

The "State ID" Web Application

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OPENING THE WEB APPLICATION

ACCESSING THE DOE WEB APPLICATIONS WEB SITE

LOCATION:

To access and use the "State ID" application, first the user needs to login to the IOWA Department of Education Web applications web site. The URL for this web site is:

https://www.edinfo.state.ia.us

The user needs to open a web browser and enter the above URL to access this site. The Iowa Department of Education advises the user to use either Microsoft Internet Explorer or Netscape Navigator for working with the department's web applications.

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> *TIP:*   *The user should not use the "**Refresh**," "**Back**," or "**Forward**" browser buttons with this web site. There are links on every page to direct the user to other screens.*

LOGGING IN TO DOE WEB APPLICATIONS

After opening the browser and entering the URL, the user will see the following Login screen:
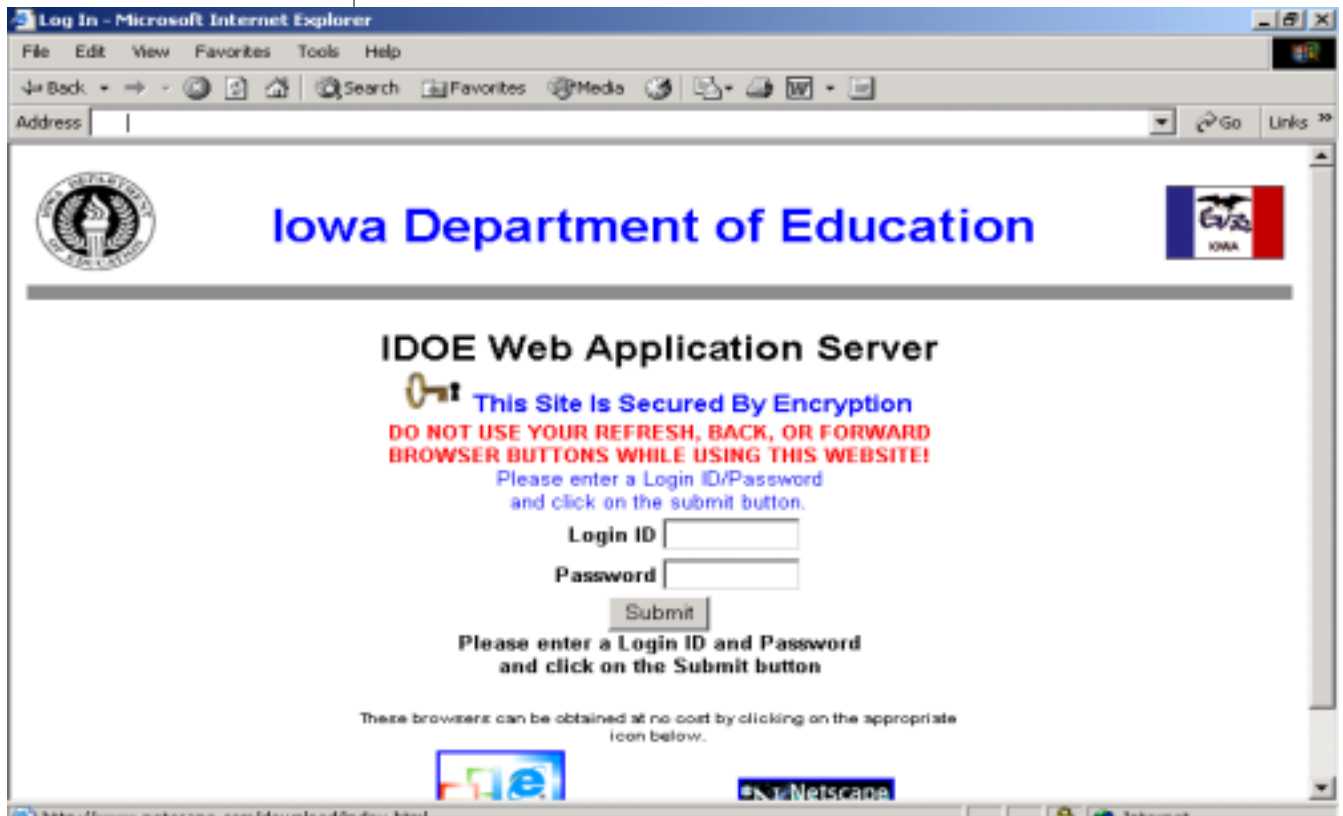
❶   Enter the login and password that was assigned to you by the Department of Education

❷   Click the **Submit** button.

SELECTING THE "STATE ID" WEB APPLICATION

Once the user has successfully logged in, the main "APPLICATION MENU" screen similar to the one below will be displayed. On this screen, the user will see a list of all the applications the user is authorized to access.
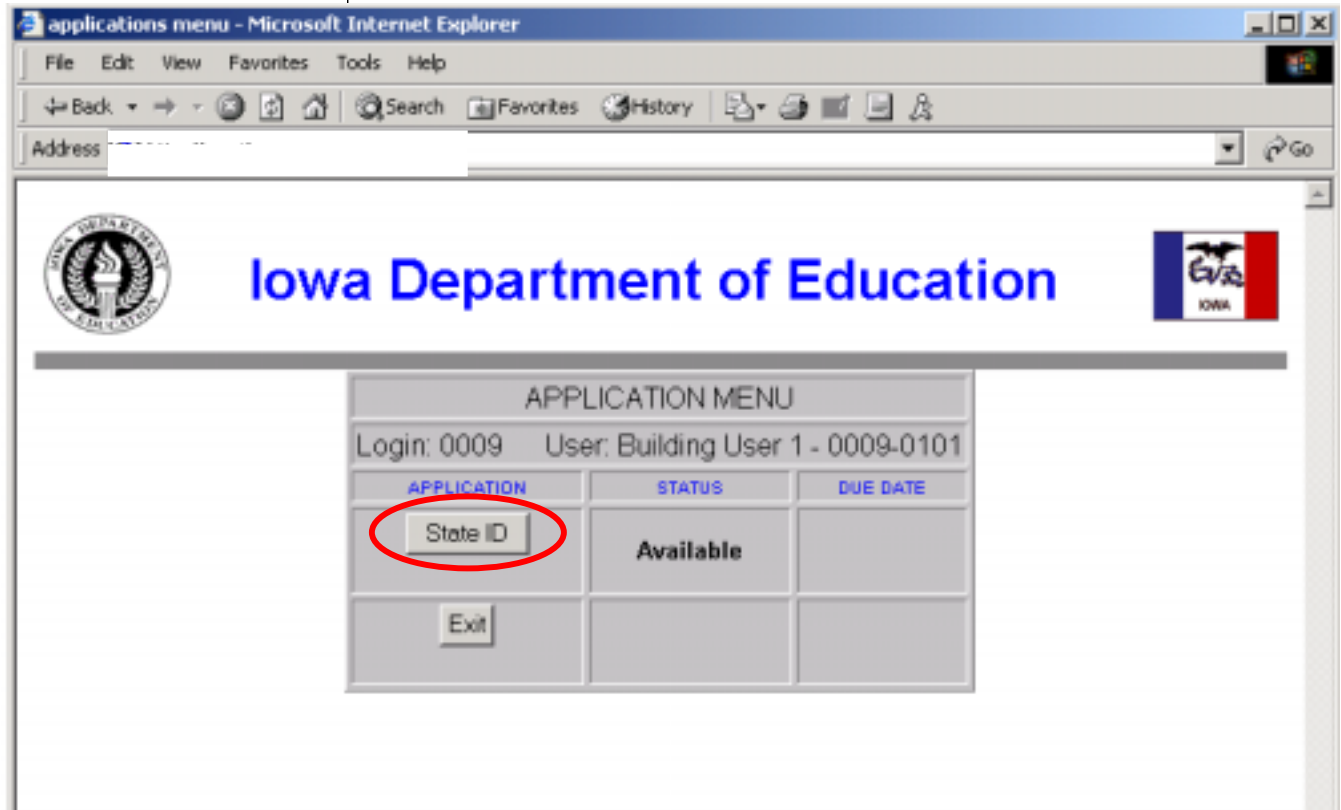
❶   Click the **State ID** button to enter the "State ID" web application

❷   Click **Exit** to logout from the Application Menu

START WORKING WITH THE "State ID System" MAIN PAGE

Once the user chooses the "State ID" button from the "APPLICATION MENU", the "State ID" application main page will appear and it will look like the following screen:

The "State ID" main page consists of two main sections:
- The top section contains command buttons that allow the user to upload batch files, enter individual student records, search for students in the "ISN Locator Database", and to extract and download various types of output batch files from the "ISN Locator System".
- The bottom section provides the user access to all batch files (or) student records that have been either uploaded into the DE Server or entered online earlier. This screen will show the current status of each batch and the next action to be performed with a command button in the last column that will allow the user to continue with the remaining process of "State ID" assignment.

> *NOTE:*   *The **"State ID Home"** button, provided on all subsequent screens within the application, will allow the user to come back to this home page at any time. Once in main page, the user can choose to perform another function or exit from the application.*

FUNCTIONS OVERVIEW

This main page is the starting point of the "State ID" application. Users will perform a desired function by clicking on the appropriate button.

UPLOADING A BATCH FILE

Using this button the user will upload an input batch file to the Department of Education server, take the entire file through the "State ID System" processes and create a "State ID" in the "ISN Locator Database" record for every student. This batch file should have been extracted earlier from the local Student Information System.

ENTERING AN INDIVIDUAL STUDENT

Using this button the user will input the required information of a new student online and assign the "State ID" instantly. This feature will be used for assigning "State ID" for students when the numbers of student records to be processed are very few. Some example scenarios are:

a. A student moves into the State for the first time during the middle of the year

b. A student record earlier fed in a batch was canceled at data validation stage by the user for want of missing information like Date of Birth. Later, after collecting this information, the user wants to assign the "State ID" for that student

SEARCHING FOR AN INDIVIDUAL STUDENT

Using this button the user will be in a position to search for an individual student record from the "ISN Locator Database". This function can be used either to verify the details of a student given the "State ID" or verify the existence of an ID for a student given the student details like Last Name and First Name.
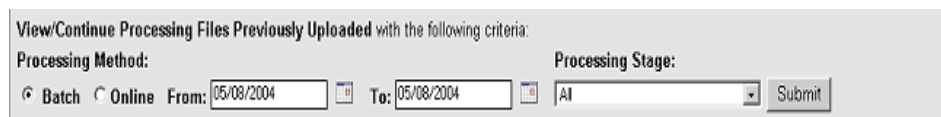
One of the usage of this function will be to verify the existence of an ID / details when a student comes for enrollment to a school.

EXTRACTING AND DOWNLOADING OUTPUT BATCH FILES

This allows the user to Extract and Download three different types of output files from the "ISN Locator System".

- Errors to Fix
- Near Matches / Duplicates to Resolve &
- IDs Assigned

VIEW/CONTINUE PROCESSING FILES PREVIOUSLY UPLOADED

This section shows all batch files that were uploaded earlier or entered online by the user.

By default the application shows all batch files that were earlier uploaded or entered online. Users will be in a position to restrict the batches displayed by entering/choosing the filtering options available on this section.

Batch: Shows only the batch files uploaded
Online: Shows only the batches created by the System for the student records entered online
From and To Dates: Restricts the display of batches uploaded or entered online during this duration. By default shows all batches – from the earliest to the latest
Processing Stage: Restricts the display of batches that are currently at a specific stage of processing. Possible stages are:
> **All:** All ID creation stages – the default option
> **Validate data:** File Uploaded. Begin Validation Stage
> **Fix Errors**: Data Validation Incomplete. Fix Data Errors
> **Assign "State ID":** Data Validation Complete. Ready to Assign "State ID"
> **Resolve Near Matches / Duplicates**: Near Matches/Duplicates Found. Resolve Near Matches/Duplicates
> **Download "State ID"**: IDs assigned. Download "State ID"

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> *TIP: For every student record entered online, "State ID System" will create one batch. This batch will contain only one record – the corresponding student record entered online*

PROCESSING A BATCH FILE

UPLOADING THE BATCH FILE

Click the **Upload Batch File** button to start processing a batch file for "State ID" assignment.

This will take the user to the screen where the user can browse, choose the batch file on the local System and upload the same to the Department of Education server.

✍️	*Note:*	*Prior to uploading the batch file for "State ID" assignment, this file should have been extracted from the local Student Information System and stored in a pre-defined location in the local computer System.*

This will return the user to the "State ID System" main page.

❶   In order to upload a batch file, the user should first locate the file in the local computer System. Click the **Browse** button to see the local System's directory structure.

A new window will open and show the local System's directory structure as shown below. Browse through the directory structure and choose the directory/folder where the "State ID" extract file/s were stored earlier.
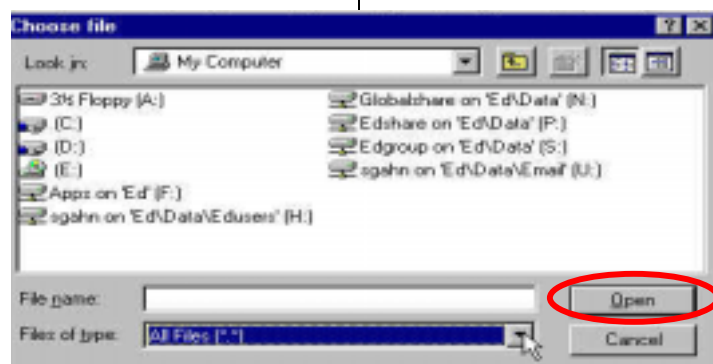
❷   Choose the correct file to be uploaded and click the **Open** button.

❸   Once the file path is in the "File to Upload" text box, click the **Upload** button. This will upload the batch file to the DE Server for subsequent processing.

NOTE: *If there are errors while uploading, they will be shown in detail in the Status section. Please see the "Errors & Informational Messages" section at the end of this document for further instructions.*

VALIDATING THE DATA

If the batch file upload is successful, the following screen is displayed.

This will return the user to the "State ID System" main

Current status of the batch file

Total number of records in the batch file

❶ To display the status of the batch file and its records at this time click **Batch Info**. This will display a pop-up window similar to the following one:

BATCH INFORMATION	
Batch Number	17
District	0009
School	0101
Transmission ID	0071262134
Extract Date	03/10/2004
Extract File	tf_0009_0101.txt
Creation User ID	0009
Created Date	05/08/2004

Click here to close the batch information window

❷ The user can now proceed to the next step "Validate Data". by clicking the **Validate Data** button. This will load the batch file from the DE server to the staging database tables, where further validation checks are performed on the data.

NOTE: *The Status column will always show the current status of the batch being processed and will guide the user for the next action to be performed. The "Next Action" column will have a command button to enable the user to initiate the next action.*

When the user initiates this process step by clicking the **Validate Data** button, the "State ID System" displays an intermediate work-in-progress page as follows.
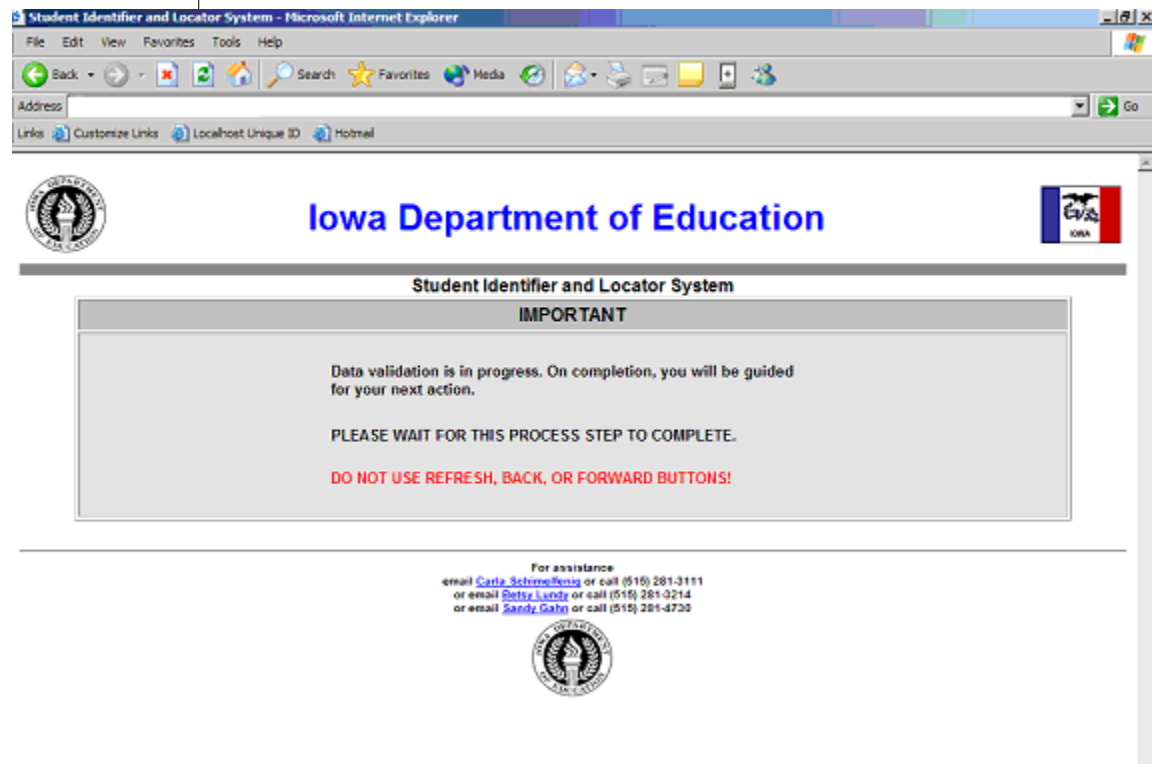
Depending on the size of the batch file, the validation process is likely to take some time. It is essential that this process be allowed to complete without any intervention.

Once the validation completes, the user is automatically taken to the next page where the validation outcome is displayed and the user is guided for the next action.

VERIFYING THE STATUS OF VALIDATION

On completion of the validation process, if the batch file contained one or more records that failed validation, the following screen is displayed. The user needs to fix the records that failed validation before submitting the batch for ID assignment.

This will return the user to the "State ID System" main page.

Current status of the batch file

Number of records that failed validation is shown in the top and the total number of records in the batch is shown in the bottom

❶ To display the status of the batch file and its records at this time click **Batch Info**. This will display a pop-up window similar to the following one:

This displays the number of records in the batch file that are valid and that can be considered for ID assignment process.

This displays the number of records in the batch file that are invalid and need to be fixed.

Click here to close the batch information window

❷ The user can now proceed to the next step "Fix Errors" by clicking the **Fix Errors** button. This will take the user to the next page where the user will review and fix the records that failed validation.

NOTE: *If no errors were found during the validation process, the user will be directly taken to the "Assign State ID" page.*

VIEWING THE VALIDATION ERRORS

This screen is displayed when the user clicks the "Fix Errors" button. This screen will show all the records in the batch that failed validation. Each record will have hyperlinks and "Edit" command button, to enable the user to choose the corresponding record for review and fix. These records need to be addressed one at a time.

This will return the user to the "State ID System" main
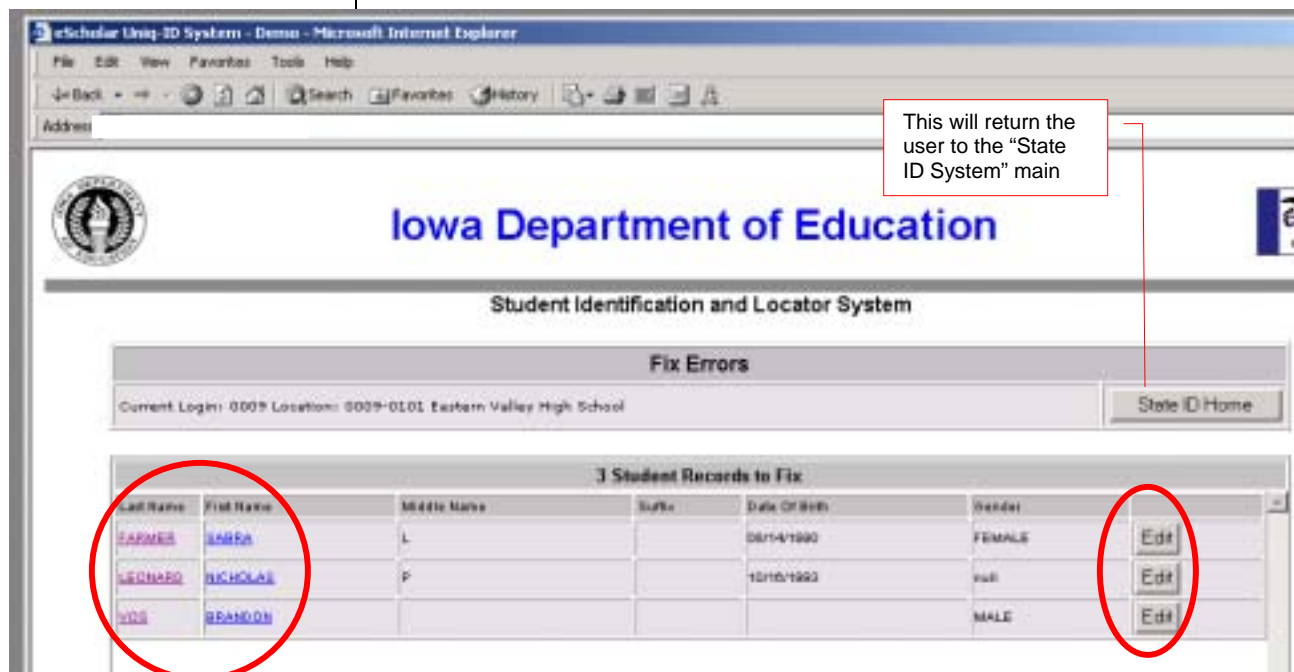
❶   To address these records click the **Edit** button or click the Last Name or First Name hyperlink of a record displayed. This will open up the "Edit Student Record" page:

NOTE: *All records that failed validation in a batch must be reviewed and fixed for the batch to be considered for "ID Assignment" process.*

TIP: *The hyperlinks in Last Name, First Name and the Edit command button, all perform the same function – take the user to the "Edit Student Record" page.*

ADDRESSING THE VALIDATION ERRORS

This is where the user will address the records that failed validation in a batch one at a time.

This will return the user to the "State ID System" main

Displays the **status** of this record.

Notes which fields are required.

Displays the validation error. When multiple errors were found in a record, all the errors are displayed here, each delimited by a ";"

Displays a counter of how many records are left to Fix

❶ To **Fix Record**: make the changes for the errors shown in the Comments box; once the changes are made, click the **Update Student Record** button. An updated record will be shown as follows. Verify the details of the updated record and click **Select Another Record** button to go back to the previous screen to select another record to review and fix.

Comments field is now empty that the error has been resolved

"Successfully Updated" confirmation message

Counter now reflects the new remaining number of records to fix.

❷   To **cancel** a record Click the **Cancel Student Record** button. The "ISN Locator System" now marks this record as canceled and shows an updated version of the record as follows. Verify the confirmation message and click **Select Another Record** button to go back to the previous screen to select another record to review and fix.

Edit Student Record			
Student Record Successfully Canceled. Please Click Select Another Record to continue.			
First Name: NICHOLAS	Middle Name: P	Last Name: LEONARD	Suffix:
Gender: ▾	Date Of Birth: ▾ / ▾ / ▾	Ethnicity: WHITE, NOT OF HISPANIC ORIGIN ▾	Sch. Code: 0101
Res. Dist: 0009	SSN #: _ _	Local Student ID: 110397063	Grade: 01 ▾
Comments:			
Update Student Record	Cancel Student Record	Select Another Record	
* Required fields			Records Remaining to Fix :1

"Successfully Canceled" confirmation message

Counter now reflects the new remaining number of records to fix.

NOTE: *<u>Do not</u> use the **Cancel Student Record** button unless you do not have, or cannot get, the correct information for the at this time, or if you do not want to hold up processing the batch file for one record. A canceled record can be entered online using "Enter Individual Student" button later once all the information is available for the student.*

❸   To skip this record at this time (to subsequently review and fix), click the **Select Another Record** button. This will return the user to the previous page where the user can view the remaining records and select another one to fix.

Update Student Record	Cancel Student Record	Proceed To ID Assignment

* Required fields   Records Remaining to Fix: 0
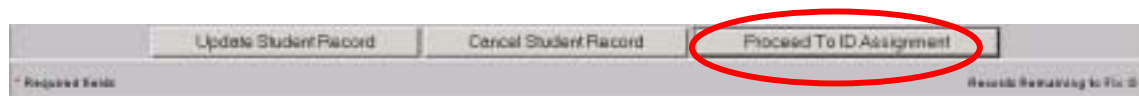
Counter now reflects the
new remaining number of
records to fix.

❷   Once all the records have been reviewed and fixed, **Select Another Record** button changes to **Proceed to ID Assignment**. Now the user can proceed to the next step – initiate the "ID assignment" process.

ASSIGNING "STATE ID"

After all validation errors are addressed, either by updating the student record or by canceling the student record in the input batch file, the user is taken to the following screen. The user is now ready to initiate the "ID Assignment" process using this screen.

This will return the user to the "State ID System" main page

Current status of the batch file

Number of records that will be considered for ID assignment is shown in the top and the total number of records in the batch is shown in the bottom

❶ To display the status of the batch file and its records at this time click **Batch Info**. This will display a pop-up window similar to the following one:

This displays the number of records in the batch file that are valid and that will be considered for ID assignment

This displays the number of records that were canceled by the user at the validation stage. These records will not be considered for ID assignment

Click here to close the batch information window

❷ To begin the process of assigning IDs to the records identified as "Waiting for ID Assignment", click the **Assign State ID** button. This process will de-duplicate every record in the batch file with the "ISN Locator Database".

When the user initiates this process step by clicking the **Assign State ID** button, the "State ID System" displays an intermediate work-in-progress page as follows.
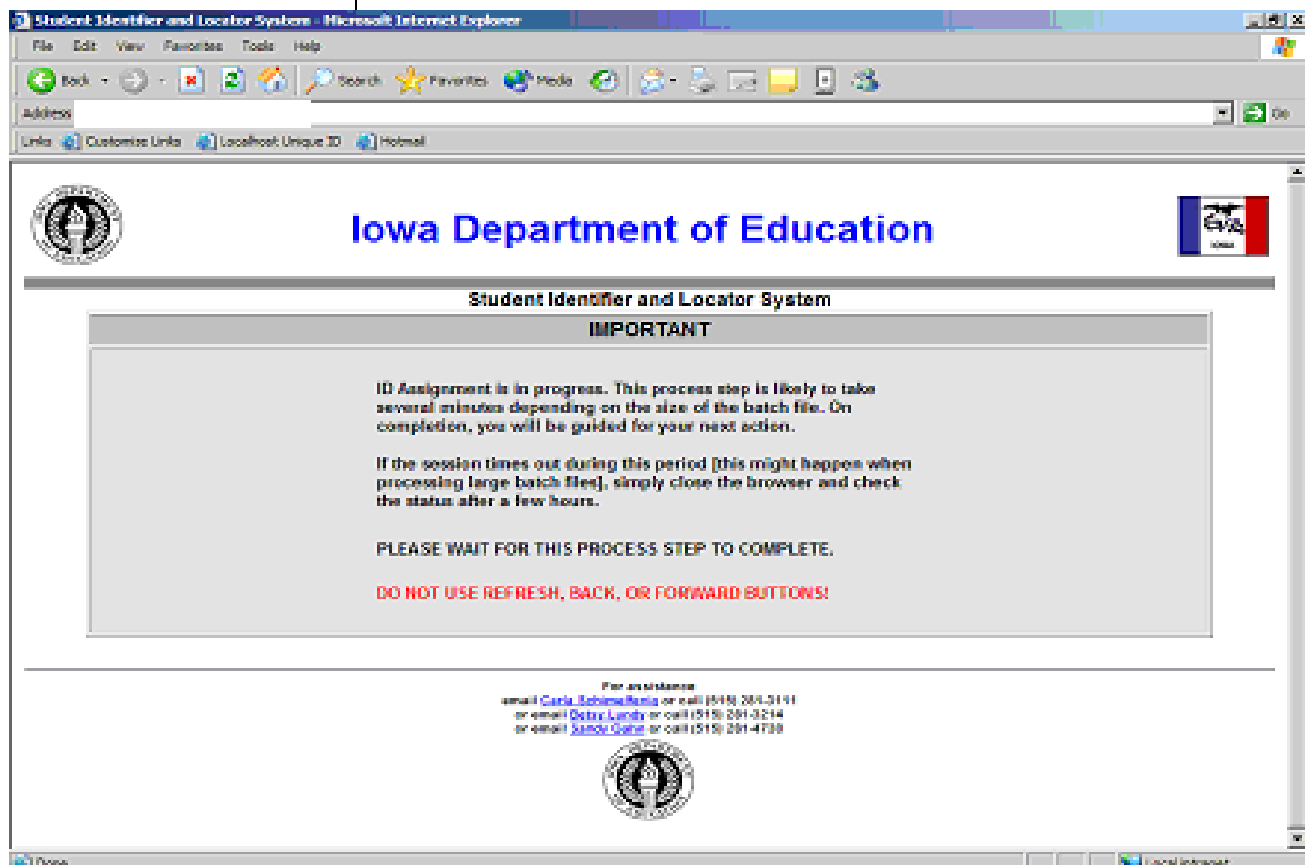
Depending on the size of the batch file, the ID Assignment process is likely to take some time (larger files may take several hours). It is essential that this process be allowed to complete without any intervention

Once the "ID Assignment" is complete, the user is automatically taken to the next page where the validation outcome is displayed and the user is guided for the next action.

Depending on the outcome of the de-duplication process, the "ISN Locator System" takes one of the following 2 actions for each record in the input file.
a. If there is no matching record in the "ISN Locator Database", a Unique "State ID" is assigned to the student and the input student record is added to the "ISN Locator Database".
b. If the record encounters a "Near Match or Duplicate" in the "ISN Locator Database" , the input record is marked as "Waiting to Resolve Near Matches/Duplicates" and **an ID is not assigned.** The user needs to review this record and resolve.

REVIEWING THE OUTCOME OF ID ASSIGNMENT PROCESS

On completion of the ID assignment process, System displays the outcome of the process and guides the user for the next action. If one or more "Near Matches/Duplicates" were encountered, a screen similar to the following one is displayed and the user is guided to proceed to resolve these cases.

This will return the user to the "State ID System" main page

Current status of the batch file

Number of records that need to be resolved for Near Matches / Duplicates is shown in the top and the total number of records in the batch is shown in the bottom

❶   To display the status of the batch file and its records at this time click **Batch Info**. This will display a pop-up window similar to the following one:

This displays the number of records in the batch file that were assigned a "State ID" .

This displays the number of records that encountered duplicates or near matches. These need to be resolved in order to assign an ID.

Click here to close the batch information window

❷   The user can now proceed to the next step "Resolve "Near Matches/Duplicates" by clicking the **Resolve Near Matches/Duplicates** button.

❷

☞   *TIP:*   *If no "Near Matches / Duplicates" were encountered, it represents successful ID assignment for all the validated records and the user is directly taken to "Download State ID" page.*

RESOLVING "NEAR MATCHES/DUPLICATES"

This screen is displayed when the user clicks the "Resolve Near Matches/Duplicates" button. This screen will show all the records in the batch that need to be resolved for "Near Matches/Duplicates". Each record will have "Review and Select" command button, to enable the user to choose the corresponding record for review and resolve. These records need to be addressed one at a time.
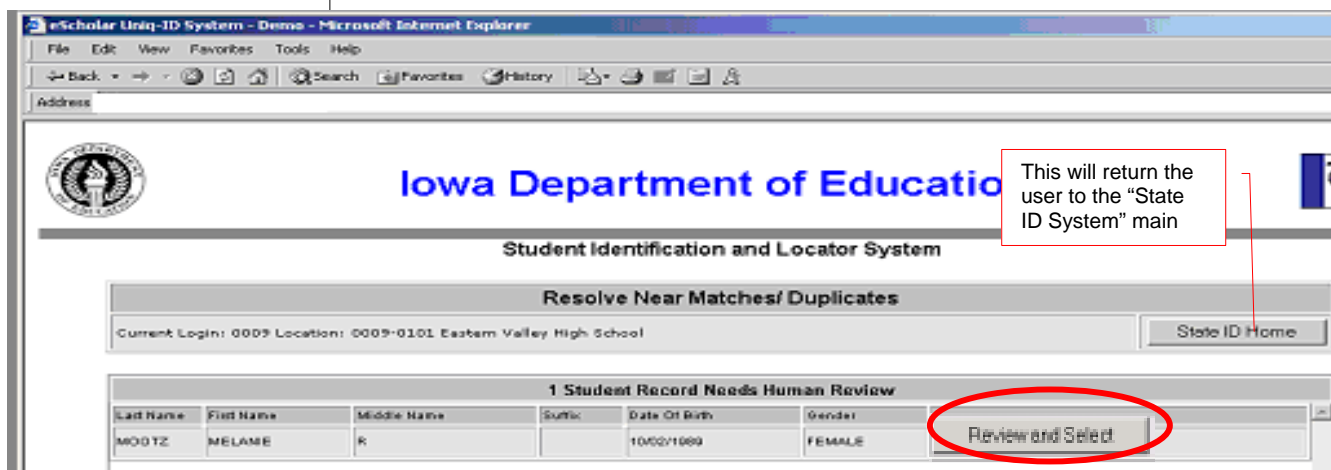
❶   To review and resolve a "Near Match/Duplicate" record, click on the **Review and Select** button. This will take the user to the "Resolve Near Matches/Duplicates" screen, where the user will be in a position to compare the input record with the reported "Near Match/Duplicate" records and resolve each case.

NOTE: *All records reported as "Near Matches/Duplicates" in a batch must be reviewed and resolved. Only after this will the user be in a position to extract and download the "State ID Assigned" output batch file that will contain the "State ID" assigned to the individual students in the file.*

This is where the user will review and resolve each of the "Near Matches/Duplicate" records reported by the "ID Assignment" process.

This will return the user to the "State ID System" main page

The match probability and type of match (Near Match or Duplicate) reported by the ID Assignment process

This is the record that needs to be resolved

This section contains the corresponding "Duplicates / Near Match" records

❶ To compare in detail the record to be resolved with a corresponding "Near Match/Duplicate" record, click on the hyperlink either in the Last Name or First Name of the "Near Match/Duplicate" record.

This is the record that needs to be resolved

This is the selected Near Match/Duplicate record from the "ISN Locator Database"

❷ To return to the "Student Records to Review" screen and resolve this case, click the **Return to List of Near Matches** button

Using the above two screens, compare the input record that need to be resolved for "Near Match/Duplicate" along with the reported "Near Match/Duplicate" records (shown in the bottom section), the user will take any one of the following actions to resolve the same. If a given input record can't be resolved unambiguously by looking at the information displayed, the user needs to analyze the matching pairs offline by collecting and comparing more information outside the "ISN Locator System".

MOOTZ	MELANIE	R		10/02/1989	FEMALE

Assign Selected	Create New ID	Cancel Record	Select Another Record

Near Matches / Duplicates Found

	Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code	Match Probability
○	MOOTZ	MELANIE	R		10/02/1989	FEMALE	0009	0101	0.999 [MATCH]

SCHOOL INFORMATION

District	0009
District Name	Eastern Valley School District
School	0101
Name	Eastern Valley High School
P.O Box	
Street	
City	Demo City
State	DD
Zip	
Contact	William Knudson
Title	Principal
Phone	(323) 345-6456
Fax	(323) 345-6457
Email	rrr@sss.xyz.abc

[X]

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> *TIP:*   *If the matching student is in a different school district/school, the user may need to contact the corresponding agency. In this case, the user can get the contact details of the concerned agency by clicking the "School code" hyperlink. A pop-up window will display the contact information as seen above.*

| MOOTZ | MELANIE | R | | 10/02/1989 | FEMALE |

Assign Selected | Create New ID | Cancel Record | Select Another Record

Near Matches / Duplicates Found

	Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code	Match Probability
○	MOOTZ	MELANIE	R		10/02/1989	FEMALE	0009	0101	0.999 [MATCH]

Based on the analysis:

❶ If the user determines that one of the students listed in the bottom "Near Match/Duplicates" section is same as that of the input student whose record is being resolved, the user needs to assign the "State ID" of that matching student to the input student. To perform this action, select the radio button of matching student from the bottom "Near Match/Duplicates" section, and click **Assign Selected** button. A popup appears asking if the user is sure that this is the same student. The user will click **Yes** to confirm it is, or click **No** to cancel the action.

When the user clicks **Yes** , the existing ID of the matching student is assigned to the input student, and the matching student's record information is logged in the history table. A new ID is not created, since both the records were identified to belong to the same student. When the user clicks **No**, no action is taken and the input record will continue to remain as "Waiting to Resolve Near Matches/Duplicates".

❷ If the user determines that none of the records in the "Near Match/Duplicate" section matched the input batch file record, the user need to assign a new ID for the input student. To perform this action, click the **Create New ID** button. This will assign a new "State ID" for the input student.

❸ If the user determines that the input record should not be considered for "State ID" creation or wish to Cancel for some valid reason, the user will cancel this record. To perform this action, click the **Cancel Record** button. Once canceled, this record is marked as canceled in this batch and no action is taken.

One of the reasons to cancel could be that the user can't resolve this case at this time, but at the same time doesn't want to hold the batch from "State ID Download". This

student can be fed again through another batch or entered online later and an ID can be assigned at that time.

After performing any one of the above actions, the user will receive an appropriate confirmation message.

If there are more records "Waiting to Resolve Near Matches/Duplicates" in the current batch, the user will proceed to review and resolve another record by clicking the **Select Another Record** button.

An input record can be skipped from resolving at this time by clicking the **Select Another Record** button. In this case, the record will still wait for resolving "Near Matches/Duplicates" in the current batch and the user must resolve this case later before proceeding to the next step "Download State ID".

Once all records are resolved with any one of the above three actions, the user will be taken to the next step "Download State ID".

EXTRACTING AND DOWNLOADING OUTPUT "STATE ID" FILE

After the batch went through the ID assignment process, including resolving of reported "Near Matches/Duplicates", the System displays the ID assignment summary screen similar to the one shown below. Now the user is ready to download a batch file that will contain all records from the input batch file for which "State ID" were assigned.

This will return the user to the "State ID System" main page

Number of records that were assigned with ID is shown in the top and the total number of records in the batch is shown in the bottom

Current Status of the batch file

❶ To display the status of the batch file and its records at this time click **Batch Info**. This will display a pop-up window similar to the following one:

This displays the number of records in the batch file that were canceled at validation stage and were not considered for "State ID"

This displays the number of records in the batch file that were assigned "State ID" by the ID Assignment process without encountering a "Near Match/Duplicate"

This displays the number of records in the batch file that were assigned ID by user using "Create New ID" action by resolving a "Near Matches/Duplicates" record.

Click here to close the batch information window

❷ To extract the output "State ID" batch file from the "ISN Locator Database" with the "State ID" assigned for the students in the file click the **Download State ID** button.

On clicking the **Download State ID** button, the output "State ID" batch file is extracted and the link to the extracted file is shown in a screen that will look similar to the following one.

This will return the user to the "State ID System" main page

Displays the link to the newly created output "State ID" batch file ready for download and instructions on how to download the file to the computer

Number of records that were assigned with ID is shown in the top and the total number of records in the batch is shown in the bottom

❶ To display the status of the batch file and its records at this time click **Batch Info**. This will display a pop-up window similar to the following one:

This displays the number of records in the batch file that were canceled at validation stage and were not considered for "State ID"
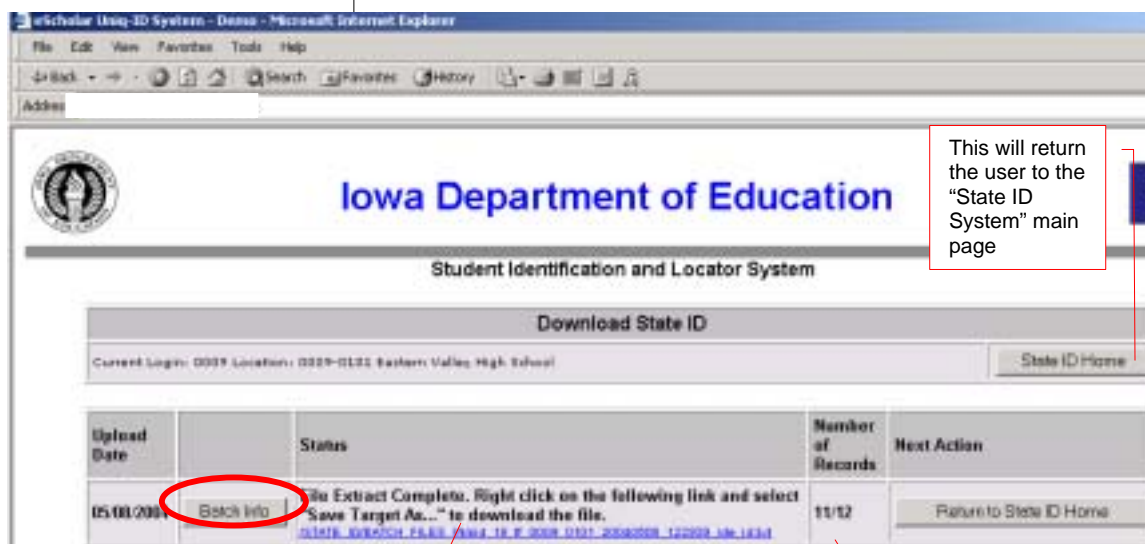
This displays the number of records in the batch file that were assigned "State ID" by the ID Assignment process without encountering a "Near Match/Duplicate"

This displays the number of records in the batch file that were assigned by user using "Create New ID" action by resolving a "Near Matches/Duplicates" record.

Click here to close the batch information window

❷   To download the file right click on the file name link in the Status section, choose "Save Target As…", browse to the location on the local computer where this file should be saved and click "OK."

This is how the file will look like when opened in a regular text editor.

> *NOTE:*   *This file now contains the "State ID" for those students in the input batch file for whom ID was assigned sand updated in the "ISN Locator Database". This is the ID that should be updated in the SIS as well as the ID that should be used when searching for an individual student in the database.*
>
> *Since this file is also the one that will be used for updating the local SIS and since it has a pre-defined format, don't make any changes in the downloaded file. View it only for verifying successful extraction and download.*

❸   To preview the file in the browser, click on the file name link.

> *NOTE:*   *This completes processing of a batch file for creating and downloading "State ID" for students using the "State ID System"*

❹   To log out or continue with another action click the **State ID Home** or **Return to State ID Home** button and follow the instructions there.

PROCESSING AN INDIVIDUAL STUDENT RECORD

CREATING ID FOR AN INDIVIDUAL STUDENT ONLINE

Click the **Enter Individual Student** button to start:

This will bring the user to the screen where the user can enter a student record and create ID for the student instantly. The user will work with one student at a time.

This is the screen that will be used for entering a student information online and creating the ID instantly.

Displayed required fields

❶　Enter student information for the student to whom an ID need to be created. The user must fill in all the required fields. If a mistake is made when entering in the information , the user can correct that individual field or click the **Clear** button to clear all fields on the screen and re-enter.

❷　After all fields are filled in correctly the user can click the **Assign State ID** button for submitting the information to a unique ID for the entered student.

❸　The "ISN Locator System" takes the input record through all the stages of ID creation process internally – similar to processing a batch record. Before taking the record for processing, System validates the input record, displays validation / input errors and allows the user to correct. Only if the record passes through all the validations, the record is accepted for ID assignment.

❹　During the ID assignment process, if the input record encounters "Near Matches/Duplicates", the user is taken to the relevant screen, so that the user can review and resolve the same. Only after resolving the same an ID can be assigned to the student by the System.

If the input record goes through the validation successfully and did not encounter any "Near Matches/Duplicates", an ID is assigned to the student instantly, and the assigned ID is displayed to the user immediately.

NOTE:	*The ISN System implements the same set of procedures, business rules and processing for a record entered online similar to that of a batch record. For every record entered online, a batch is created internally. This batch resembles that of the regular uploaded batch file except that this batch will contain only one record. The user can see this batch online and perform actions likes "Resolve Near Matches/Duplicates" and "Download State ID" at a later time.*

As explained earlier, if the entered student record went through all the validation checks and did not encounter any "Near Matches/Duplicates", System assigns an ID to the student and displays the same to the user in a screen that will look similar to the following one.

This is the ID assigned to the student that the user will update as the "State ID" of the student in the local SIS and also use for subsequent searching in the "ISN Locator Database".

This will return the user to the "State ID System" main

Displays the unique ID of the student

❶ To display information about the batch file created for the entered student click **Batch Info**. This will display a pop-up window similar to the following one:

This displays that there is only one record in the batch and for whom the ID is created without encountering "Near Matches / Duplicates"

Click here to close the batch information window

❷ The user can either note down the assigned ID from the status column manually or download the same as a file – similar to a normal batch file - by clicking the **Download State ID** button.

On clicking the **Download State ID** button, the output "State ID" batch file is extracted and the link to the extracted file is shown in a screen that will look similar to the following one.

This will return the user to the "State ID System" main page

Iowa Department of Education

Student Identification and Locator System

Download State ID

Current Login: 0009 Location: 0009-0101 Eastern Valley High School   State ID Home

Upload Date		Status	Number of Records	Next Action
05/08/2004	Batch Info	File Extract Complete. Right click on the following link and select "Save Target As..." to download the file. (STATE ID\BATCH FILES (0009 20 online record 20040508 12a032 ide id).txt	1/1	Return to State ID Home
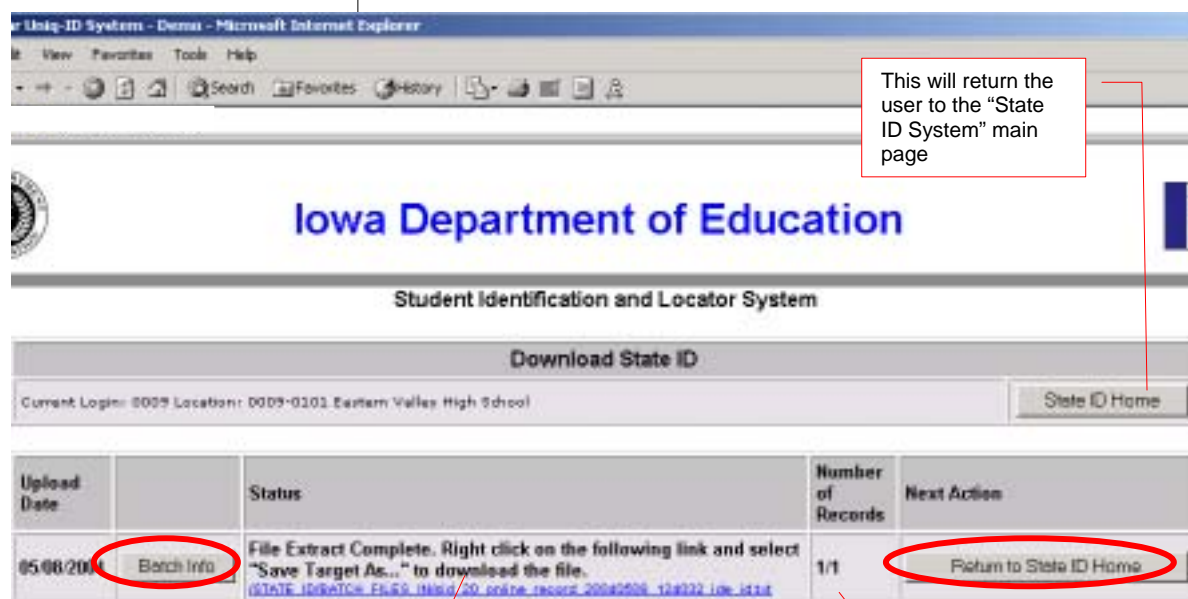
Displays link to the newly created State ID file, ready for download and instructions on how to download the file to the local computer

The number of records in the batch file that were assigned or updated with Unique IDs.

❶   To display information about the batch file created for the current student click **Batch Info**. This will display a pop-up window similar to the following one:
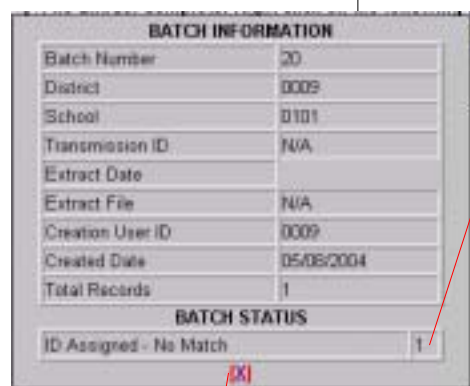
BATCH INFORMATION	
Batch Number	20
District	0009
School	0101
Transmission ID	N/A
Extract Date	
Extract File	N/A
Creation User ID	0009
Created Date	05/08/2004
Total Records	1
BATCH STATUS	
ID Assigned - No Match	1

This displays the number of records in the batch file that were assigned by user using "Create New ID" action by resolving a "Near Matches/Duplicates" record.

Click here to close the batch information window

❷   To download the file to the local computer follow the instructions in the Status section.

❸   To log out or continue with another action click the **State ID Home** or **Return to State ID Home** button.

SEARCHING FOR AN INDIVIDUAL STUDENT

SEARCHING FOR AN INDIVIDUAL STUDENT RECORD

Click the **Searching Individual Student** button to start:

This will bring the user to the screen where the user can search for an individual student either by entering the student's "State ID" number or by entering a student's basic information like first name, last name, date of birth etc.

This is the screen where the user will enter either the "State ID" or the basic student details of a student to search for an individual student in the "ISN Locator Database".

This is where the unique 10-digit "State ID" that was assigned to the student can be entered to search based on ID

The top part of the screen will be used to search for a student in the "ISN Locator Database" given the "State ID". On this type of search, the result will be either an "exact match is found" or "not found".

❶   To search for a student based on ID, enter the 10-digit "State ID" of the student and click the **Search** button in the top part of the screen.

The bottom part of the screen will be used to search for a student in the "ISN Locator Database" given the student details like first name, last name and date of birth. This search is based on probabilistic method and hence all "Near Matches and Duplicates" are displayed as output along with the matching probability.

❷   To search for a student, based on student details, enter the known details about the student in the relevant fields and click the **Search** button in bottom part of the screen.

NOTE: *To search based on student details, the user need to enter at the minimum the full first name and the last name of the student. Wild card characters like '%' , '_' and '?' are not supported.*

To clear the previously entered search criteria and start the search all over again click the **Clear** button.

Once the user clicks any one of the "Search" button, System searches for matching records in the "ISN Locator Database".

If no matches are found, System displays a feedback confirming that "No matches found" and allows the user to continue searching with different search criteria.

When the search is based on student details, and if one or more Matches and/or "Near Matches" were found, System displays the matching records, along with the matching type and match probability at the bottom section of the screen as follows. The list is displayed such that the closest match is displayed as the first record and the least match is displayed as the last record.

This is the student information the user is searching for

This displays any matches for that student from the "ISN Locator Database"

❶   To see more information about a matching student one at a time click the hyperlink on Last Name or First Name. This will take the user to the "Student Information" screen where the user can see more details of that student including the history details if available.

NOTE: *If the search is based on "State ID" and if a match is found, the user is directly taken to "Student Information" screen, since there will be only one match at a maximum for a given "State ID".*

This screen is displayed either when a "State ID" based search is performed and a match is found (or) when a user clicked on one of the matching student's hyperlink in the previous screen.

Student Identification and Locator System

Search Individual Student

This will return the user to the "State ID System" main

Current Login: 0009 Location: 0009-0101 Eastern Valley High School   State ID Home

The "State ID" of the student

Student Information [State ID: 1181483657]

First Name:	Brandon	Middle Name:		Last Name:	Voss	Suffix:	
School :	0009-0101 Eastern Valley High School	Res. Dist:	0009	Local Student ID:		Grade:	07
Gender:	MALE	Date Of Birth:	06/26/1986	Ethnicity:	WHITE, NOT OF HISPANIC ORIGIN	Sch. Yr:	2003
Created:	05/23/2004	Last Updated:	05/25/2004	Update Ref #:	51		

Search Another

History Information

History Date	Last Name	First Name	Middle Name	Suffix	Gender	Date Of Birth	Race/Ethnicity	District	School
05/25/2004	VOSS	BRANDON			MALE	06/26/1986	WHITE, NOT OF HISPANIC ORIGIN	0009	0101

This is the history of the student of history information is available for the displayed student.

❶   This screen provides more detailed information on the student found in the "ISN Locator Database", as well as any history detail available for the student. To search for another student or to modify the current search click the **Search Another** button. This will take back the user to the previous screen to search another student.

❷   When history is found, clicking on the "History Date" hyperlink the "History Information" table will show a pop-up containing the full information of the corresponding history record.

History Information

History Date	Last Name	First Name	Middle Name	Suffix	Gender	Date Of Birth	Race/Ethnicity	District	School
06/12/2004	VOSS	BRANDON			MALE	06/26/1986	WHITE, NOT OF HISPANIC ORIGIN	0009	0101

History Date: 06/12/2004

First Name:	BRANDON	Middle Name:		Last Name:	VOSS	Suffix:	
School :	0009-0101 Eastern Valley High School	Res. Dist:	0009	Local Student ID:	196641963	Grade:	07
Gender:	MALE	Date Of Birth:	06/26/1986	Ethnicity:	WHITE, NOT OF HISPANIC ORIGIN	Sch. Yr:	2005
Created:	06/12/2004	Last Updated:	06/12/2004	Update Ref #:	1446		

History information pop-up

Click here to close the batch information window

EXTRACTING & DOWNLOADING OUTPUT BATCH FILES

EXTRACTING AND DOWNLOADING AN OUTPUT BATCH FILE

Click the **Extract & Download Batch** button to start:

This will bring the user to the screen where the user can choose a specific type of batch file, display the list of batches available on that type, and then choose a batch from the list to extract and download from the "ISN Locator Database".

☞   *TIP: The user can use this function at any time.*

This is the screen where the user will choose the desired filter details, get the list of batches fulfilling the filter details and choose one to download.

This list box shows the types of download

This will return the user to the "State ID System" main page

Date range - To

Date range - From

Iowa Department of Education

Student Identification and Locator System

Extract & Download Batch File

Current Login: 0009 Location: 0009-0101 Eastern Valley High School

State ID Home

From: 05/08/2004   To: 05/08/2004   IDs Assigned   Submit

IDs Assigned
Errors to Fix
Near Matches/Duplicates to Resolve

Upload Date		Status	Number of Records	Next Action
05/08/2004	Batch Info	IDs successfully created.	12/12	Extract

Batch files found that meet the specified search criteria entered in top section.

The current status of the batch file

Number of records that were assigned with IDs is shown in the top and the total number of records in the batch is shown in the bottom

❶ In the top part of the screen the user will enter the filter details – namely the date range during which the batch file was uploaded and the desired type of download and click the **Submit** button. **In this case, the user selected to download a batch that is currently in the "IDs Assigned" stage.**

Batches meeting the specified search criteria will be displayed in the bottom section.

❷ To see the status of a displayed batch and its records, click **Batch Info**. This will display a pop-up similar to the following one.

BATCH INFORMATION

Batch Number	18
District	0009
School	0101
Transmission ID	0071282134
Extract Date	03/10/2004
Extract File	H_0009_0101.txt
Creation User ID	0009
Created Date	05/08/2004

BATCH STATUS

Canceled at Fix Errors	1
ID Assigned - No Match	10
ID Assigned - Near Match	1

Click here to close the batch information window

❸ Select a batch desired batch from the list and click the **Extract** button to extract and download that batch.

On clicking the **Extract** button, the selected type of batch file for the selected batch is extracted and the link to the extracted file is shown in a screen that will look similar to the following one.

This will return the user to the "State ID System" main

Iowa Department of Education

Student Identification and Locator System

Extract & Download Batch

Current Login: 0009 Location: 0009-0101 Eastern Valley High School   State ID Home

Upload Date		Status	Number of Records	Next Action
05.08.2004	Batch Info	File Extract Complete. Right click on the following link and select "Save Target As..." to download the file. /STATE_ID/BATCH FILES 1Ikjut_Vi # 0009_0101_20040508_125216_ids_id.txt	12/12	Return to State ID Home

Displays link to the newly created student file ready for download and instructions on how to download the file to the local computer

Number of records that were assigned with IDs is shown in the top and the total number of records in the batch is shown in the bottom

❶   To see the status of the current batch and its records, click **Batch Info**. This will display a pop-up similar to the following one.

BATCH INFORMATION

Batch Number	18
District	0009
School	0101
Transmission ID	0071262134
Extract Date	03/10/2004
Extract File	if_0009_0101.txt
Creation User ID	0009
Created Date	05/08/2004

BATCH STATUS

Canceled at Fix Errors	1
ID Assigned - No Match	10
ID Assigned - Near Match	1

Click here to close the batch information window

❷   To download the file right click on the link in the Status section, choose "Save Target As…" browse to the location on the local computer where this file should be saved and click "OK."

Once downloaded and opened in text editor for preview, the contents of the file will look like the following.

1 TH	05/05/2004		08:54:14	0071262134								
2 ID	0101	0009	FARMER SABRA L.		F	08/14/1980	03	106632359	106632359	H	7697685378	
3 ID	0101	0009	VOSS BRANDON		M	06/26/1986	07	106641963	106641963	W	1181483657	
4 ID	0101	0009	LEONARD NICHOLAS	P	M	10/16/1993	01	110397063	110397063	W	9509805642	
5 ID	0101	0009	MOOTZ MELANIE R		F	10/02/1989	05	110406667	110406667	W	9357766799	
6 ID	0101	0009	WOOD DOROTHY		F	03/04/1986	07	110418271	110418271	W	7899222469	
7 ID	0101	0009	BATTS TIFFANY N	F		02/09/1992	02	110427075	110427075	B	6796724630	
8 ID	0101	0009	ADEPEGBA ZAHIR		M	12/11/1983	10	110448283	110448283	H	3297766853	
9 ID	0101	0009	MORIARITY MICHAEL	D		M	08/22/1992	02	110466691	110466691	W	7159964243
10 ID	0101	0009	TRAVERS KEITH M		M	06/18/1986	08	110496703	110496703	W	8313809866	
11 ID	0101	0009	RODOLPH CURTIS		M	03/27/1990	04	110506307	110506307	H	3916239696	
12 ID	0101	0009	MOOTZ MELANIE R		F	10/02/1989	05	110406667	110406667	W	9357766799	
13 ID	0101	0009	VOS BRANDON		M	02/02/2000	07	106641963	106641963	H	7664021084	
14 TT	0071262134		14									

> ✍ *NOTE:*   *This file now contains the "State ID" for those students in the input batch file for whom the ID is created successfully and updated in the "ISN Locator Database". This is the ID that should be updated in the SIS as well as the ID that should be used when searching for an individual student in the database.*
>
> *Since this file is also the one that will be used for updating the local SIS and since it has a pre-defined format, don't make any changes in the downloaded file. View it only for verifying successful extraction and download.*

❸   To view this file in a web browser, click on the blue link.

❹   To log out or continue with another action click the **Return to State ID Home** or **State ID Home** button.

> ✍ *NOTE:*   *The same procedure can be followed for downloading the other two types of files, namely:*
> *- Errors to Fix &*
> *- Near Matches/Duplicates to Resolve*
>
> *The user will simply choose the desired type of download instead of "IDs Assigned" and continue the same process.*
>
> *The downloaded file's format, the contents and the purpose for which each type of download will be used are different. Refer to "Input and Output Files Interfaces" section on page 51 for more information.*

VIEW/CONTINUE PROCESSING FILES PREVIOUSLY UPLOADED

VIEW/CONTINUE PROCESSING FILES PREVIOUSLY UPLOADED

When the user login and enter the "State ID" application, the first screen the user will see will be the main page that will look similar to the following. The screen shown below shows the appearance of this screen for a new user who have not uploaded any batch file and also have not entered any student information online and created ID so far. Hence there were nothing in progress for this user and hence no batches were displayed.

This will be staring point for a new user. The user will start work by either uploading a batch file using **Upload Batch File** button or by creating an ID online using **Enter Individual Student** button.

Once a user started using the application, depending on the user's work in progress, during subsequent logins, the System will show all the uploaded batch files in the main page automatically. This screen will look similar to the following one. This will allow the user to continue processing where the user has left the last session earlier.

Batch files found that meet the criteria specified in top section.

Current batch status

Number of records in current status at the top and total number of records in the batch at the bottom

Command button to initiate next action

BATCH INFORMATION

Batch Number	10
District	0009
School	0000
Transmission ID	0071262136
Extract Date	03/10/2004
Extract File	tf_0009_0102_1.txt
Creation User ID	0009
Created Date	06/13/2004
Total Records	12

BATCH STATUS

ID Assigned - No Match	10
Waiting to Resolve Near Matches	2

[X]

By default the System shows all uploaded batch files. Users will be in a position to filter the batches displayed by entering/choosing different selections in the top portion of the screen as shown below.

Batch: Shows only the batch files uploaded
Online: Shows only the batches created by the System for the student records entered online
From and To Dates: Restricts the display of batches uploaded or entered online during this duration. By default shows all batches – from the earliest to the latest
Processing Stage: Restricts the display of batches that are currently at a specific processing stage. The different stages are:

     All: All ID creation stages – the default option
     Validate data: File Uploaded. Begin Validation Stage
     Fix Errors: Data Validation Incomplete. Fix Data Errors
     Assign State ID: Data Validation Complete. Ready to Assign "State ID"
     Resolve Near Matches / Duplicates: "Near Matches / Duplicates" found. Resolve Near Matches / Duplicates
     Download State ID: IDs assigned. Download "State ID"

❶   To filter the list of batches displayed, enter the desired filtering criteria at the top section as described above and click **Submit** button.

Now the System will display only those batches that will fulfill the entered search criteria.

❷   Select the batch you want to work and click on the corresponding command button in the last column.

APPENDIX A - ERROR & INFORMATIONAL MESSAGES

Message	Recommended User Action / Description of Message
Authentication failed.	Check your Login ID and Password.
Batch does not contain any records to process.	Make sure the file that you selected contains data.
Contact DE for Assistance.	Contact the Department of Education for assistance; use the contact information on page 3.
Date Of Birth is not present	Date of birth not found in a student record.
Date Of Birth is not valid	The date of birth in the student record is not in the valid format: mm/dd/yyyy or incorrect
Error Record Count exceed the allowed limit of 30	The number of errors in the input file has exceeded the number of errors allowed by the DE, 30. Fix the errors in your local SIS and re-extract the file so that it contains less than 30 error records
File Upload failed for the following reasons:	The file did not upload for the following reasons. ….. ….. ; Fix these errors in the local SIS and re-upload the file again
Filename already exists	Either the file has already been uploaded or you have more than one file with the same name.
First Name is not present	First name not found in a student record
Gender is not present	Gender not found in student record
Gender is not valid	The gender in the student record is not in the valid format.
Grade Level is not present	Grade level not found in a student record
Grade Level is not valid	The grade level found in the student record is incorrect
Header Record is not valid	The header on the input record is not correct. Re-extract the file correctly and upload.
Header Record does not contain all fields	The header on the input record is not correct. Re-extract the file correctly and upload.
ID successfully assigned - A match was found.	The user created an ID for a student by resolving a "Near Match/Duplicate" case. Earlier, during the "ID Assignment" process, "ISN Locator System" encountered one or more "Near Matches/Duplicates" and tagged the record as "Waiting to Resolve Near Matches/Duplicates".
Invalid file. Not meant for "State ID" creation.	Input file is not in the specified format defined for "State ID System". Please check your Input file.
Last Name is not present	Last name not found in a student record
Local Student ID is not present	Local student ID not found in a student record.
Mismatch In Record Count.	The actual number of student records in the input file does not match the number of records recorded in the trailer record of the file
New ID successfully assigned to the Student.	The student was successfully assigned a unique "State ID".
No matches found.	No matching record in the "ISN Locator Database" for the entered search criteria
Race/Ethnic Code is not present	Race/ethnic code not found for a student record
Race/Ethnic Code is not valid	The race/ethnic code in a student record is not in the valid format.
Record count greater than allowed limit of 30000	The number of records in the input file exceeded the maximum number of records allowed for a file by the DE, 30000. Re-extract as multiple number of small files so that the number of records in the file will not exceed the specified limit.
Record ID is not present	There is no ID type record found in an input file – ID type record is the student record
Record(s) does not contain all fields	A student record in the input file does not contain all the fields
Record(s) have data error	A student record in the input file has one or more errors in data.
Record(s) have incorrect record format	A student record in the input file is not in the valid format
Residential District is not present	Residential district not found in a student record
Residential District is not valid	Residential district found in a student record is not valid.

Message	Recommended User Action / Description of Message
School building number is not valid for current district	The school building number in a student record is not valid for the current district
School building number is not present	School building number is not found in a student record
SSN is not valid	The Social Security Number in student record was not in the correct format: 999-99-9999. Supply the full SSN or delete it completely.
"State ID System" is busy. Try again later.	Already maximum allowed number of users are using the "State ID System" at this time. Wait and try back later. Try after a few hrs.
Student Record Canceled. No ID will be assigned.	The current student record is flagged as canceled and will not be considered for ID assignment in this batch. If the canceled record is a genuine one, this record is to be re-fed again either through online or in a subsequent batch and an ID to be assigned.
Student Record Successfully Canceled. Please Click "Proceed To ID Assignment" to continue.	The current student record is flagged as canceled and will not be considered for ID assignment in this batch. If the canceled record is a genuine one, this record is to be re-fed again either through online or in a subsequent batch and an ID to be assigned. When "Proceed to ID Assignment" is clicked, System will take the user to the next screen where the user can initiate the ID Assignment process.
Student Record Successfully Canceled. Please Click "Select Another Record" to continue.	The current student record is flagged as canceled and will not be considered for ID assignment in this batch. If the canceled record is a genuine one, this record to be re-fed again either through online or in a subsequent batch and an ID to be assigned. When "Select Another Record" is clicked, the user will be shown the remaining records that need to be edited, so that the user can choose the next one and Edit.
Student Record Successfully Updated. Please Click "Proceed To ID Assignment" to continue.	The current student record has been updated successfully with the changes made in the Edit screen. When "Proceed to ID Assignment" is clicked, System will take the user to the next screen where the user can initiate the "ID Assignment" process.
Student Record Successfully Updated. Please Click "Select Another Record to continue".	The current student record has been updated successfully with the changes made in the Edit screen. When "Select Another Record" is clicked, the user will be shown the remaining records that need to be edited, so that the user can choose the next one and Edit.
System Error.	Please note down the full error message, the situation at which the error has occurred and contact the DE with this information using the contacts on page 3 for assistance.
This feature is not yet made available.	This feature is not available for use at this time; it will be made available at a future date.
Trailer Record does not contain all fields	The trailer record on the input batch file does not contain all fields. Re-extract the file and upload again. Contact your SIS vendor if needed.
Trailer Record is not valid	The trailer record on the input batch file is invalid. Re-extract the file and upload again. Contact your SIS vendor if needed.
Transmission ID is not present in Header	Transmission ID is not present in the Header record in the input batch file. Re-extract the file and upload again. Contact your SIS vendor if needed.
Transmission ID is not present in Trailer	Transmission ID is not present in the Trailer record in the input batch file. Re-extract the file and upload again. Contact your SIS vendor if needed.
Transmission ID Mismatch In Header And Trailer Records.	Transmission ID found in the Header and Trailer record were not same. Re-extract the file and upload again. Contact your SIS vendor if needed.
You have successfully logged out. Please wait while you are redirected to Application Menu	You have been logged out of the "State ID" web application. To perform more operations you must log in again.

APPENDIX B - INPUT AND OUTPUT FILES INTERFACES

Four different types of batch files are used in the "State ID System". They are:

Input "Student Info" File

Output "IDs Assigned" file
Output "Errors to Fix" file
Output "Near Matches/Duplicates to Resolve" file

The input file is extracted from the local SIS and uploaded into the "ISN Locator System" for ID assignment. The output files are extracted and downloaded from the "ISN Locator System" at different stages of ID Assignment process.

a) All of these files contain three different types of record in the following order:

A header record as the first record with "TH" as the record type
One or more student detail records with "ID" as the record type
A trailer record as the last record with "TT" as the record type

b) The fields in all of the above record types are delimited by tab

c) All of these files will have a predefined list of fields

For a file to be valid, all of the requirements need to be met.

INPUT "STUDENT INFO" FILE

This file is the student information file extracted from the local SIS System and uploaded into the "ISN Locator System" for "State ID" assignment.

This file will contain the following fields in the "ID" type record in order.

Record ID – will always have "ID"
School Number
Resident District
Student Last Name
Student First Name
Student Middle Name
Student Suffix
Gender
Birth Date
Grade Level
Local Student ID
Social Security Number
Race / Ethnicity
State Student ID (will be blank prior to first time ID creation)

OUTPUT "IDS ASSIGNED" FILE

Once an input student information file is completely processed by the System, users will extract and download this file from the "ISN Locator System". The format of this file is exactly same as that of the input file, except that the last column "State Student ID" will contain the "State ID" assigned to the student by the "ISN Locator System" This file will only contain only those records of the input file for which "State ID" is assigned either automatically by the System (or) by resolving "Near Matches/Duplicates" by the User.

This file will contain the following fields in the "ID" type record in order.

Record ID – will always have "ID"
School Number
Resident District
Student Last Name
Student First Name
Student Middle Name
Student Suffix
Gender
Birth Date
Grade Level
Local Student ID
Social Security Number
Race / Ethnicity
State Student ID (will have "State ID" assigned by the System)

OUTPUT "ERRORS TO FIX" FILE

Users can download this file for offline analysis/reference purpose after the data validation stage, if the System reports one or more records had data validation error. Once all the errors are addressed, this file will not be accessible, because these records in the corresponding batch file are not waiting for fixing errors any more.

This file will have all the fields in the input batch file in the same order. In addition, there will be 3 more fields added at the end of the record to contain the following information. They are:

Record Status: Will always have the value "Waiting to Fix Errors"
Record Reference Number: For future use (An internally generated number assigned to every input record to identify it uniquely within the System). It is not the "State ID" Number.
Error List: Will contain the list of validation errors that the input record encountered during the validation process. If more than one error was found in a record, all errors are listed with each one delimited from the other by a semicolon.

This file will contain only those records that had at least one error that need to be fixed by the user prior to proceeding with "ID Assignment" process for the batch.

This file will contain the following fields in the "ID" type record in order.

Record ID - will always have "ID"
School Number
Resident District
Student Last Name
Student First Name
Student Middle Name
Student Suffix
Gender
Birth Date
Grade Level
Local Student ID
Social Security Number
Race / Ethnicity
State Student ID
Record Status
Record Reference Number
Error List

OUTPUT "NEAR MATCH/DUPLICATES TO RESOLVE" FILE

Users can download this file for offline analysis/reference purpose after the "ID Assignment" stage, if the System reports one or more "Near Matches/Duplicates". Once all these "Waiting to Resolve Near Matches/Duplicates" were addressed, this file will not be accessible, because these records in the corresponding batch file are not "Waiting to Resolve Near Matches/Duplicates" any more.

This file will have all the fields in the input batch file in the same order. In addition, there will be 3 more fields are added at the end of the record to contain the following information. They are:

Record Status: Will always have the value ""Waiting to Resolve Near Matches"
Record Reference Number: For future use (An internally generated number assigned to every input record to identify it uniquely within the System). It is not the "State ID" Number.
Match / Near Match List: Will contain the list of "State ID" of the students in the "ISN Locator Database" that the input record had encountered as a "Near Match" or "Match". If more than one "Near Match" or "Match" was found for the record, all corresponding "State ID" are listed with each one delimited from the other by a semicolon.

This file will contain only those records that had encountered at least one "Near Match" or "Match" with the "ISN Locator Database" during the "ID Assignment" process.

This file will contain the following fields in the "ID" type record in order.

Record ID - will always be "ID"
School Number
Resident District
Student Last Name
Student First Name
Student Middle Name
Student Suffix
Gender
Birth Date
Grade Level
Local Student ID
Social Security Number
Race / Ethnicity
State Student ID
Record Status
Record Reference Number
Match / Near Match List

NOTES, COMMENTS & SUGGESTIONS

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QUICK GUIDE TO ASSIGNING "STATE ID" FOR BATCH FILES

1. Extract the file from the local Student Information System (SIS) using vendor documentation. Save the file in a location easy to remember.
2. Login to www.edinfo.state.ia.us (BEDS website)
3. Click "State ID" web application.
4. Click "Upload Batch File" button
5. Click Browse.
6. Find the extracted file on your computer. Click "File" and click "Open".
7. Click "Upload".
8. Check the status message in the confirmation page.
   - If file not uploaded due to errors in the file, correct them in the local SIS and return to step 1.
   - If file successfully uploaded, go to step 9.
9. Click "Validate data"
10. Wait for the process to complete
11. Check for the status message in the confirmation page
    - If errors were reported:
      o Click "Fix Errors" and fix each record. Once you address all records, click "Proceed to ID Assignment" to go to Step 12
    - If no errors were found, you will be directly taken to Step 12
12. Click "Assign State ID"
13. Wait for the process to complete
14. Check for the status message in the confirmation page
    - If "Near Matches/Duplicates" were reported, click "Resolve Near Matches/Duplicates", review and resolve them one by one. For every record, take any one of the following action:
      o If the input student record and one of the reported "Near Matches/Duplicates" are one on the same, check the radio button of the corresponding "Near Match/Duplicate" record and click "Assign Selected"
      o If the input student record is not the same as any one of the reported "Near Matches/Duplicate" record, click "Create New ID"
      o If you determine that an input record came to this stage by error or can't be resolved, click "Cancel Record".
        After taking any of the above action, carefully look at the confirmation message and proceed to the next record by clicking "Select Another Record".
      o If you can't determine at this time, skip this record temporarily by clicking "Select Another Record". This record is still "Waiting to Resolve Near Matches/Duplicates" and you need to revisit this record later and resolve.
        Once all records are resolved, you will be directly taken to Step 15.
    - If no "Near Matches/Duplicates" were found you will be directly taken to Step 15.

15. Click "Download State ID". System will extract the file and will show you the link to download the extracted file to your local computer.
16. Download the file and verify
    - Through a web browser by double clicking on the link
    - To download the file:
        o Right click on link provided. Select Save Target As . . .
        o Select location to save your download on your computer from the "Save In:" dropdown at the top of the "Save As" screen.
        o Change the downloaded filename in "File name:" box, if you desire.
        o Click "Save".
        o Select "Open" to view and verify the downloaded file or Close
17. Select "State ID Home" or "Return to State ID Home" to return to the "State ID" main page.
18. Select another function or press EXIT on "State ID" page.
19. Select EXIT in the Application Menu to log out.
20. Close the Browser

QUICK GUIDE TO ASSIGNING "STATE ID" FOR INDIVIDUAL STUDENTS ONLINE

1. Login to www.edinfo.state.ia.us (BEDS website)
2. Click "State ID" web application.
3. Click "Enter Individual Student" button.
4. Enter all the information for the student. Fields marked with "*" are must fields
5. Click "Assign "State ID"
   - If "Near Matches/Duplicates" are reported, click "Resolve Near Matches/Duplicates", and resolve. For resolving a "Near Match/Duplicate", you will take any one of the following action:
     - If the input student record and one of the reported "Near Matches/Duplicates" are one on the same, check the radio button of the corresponding "Near Match/Duplicate" record and click "Assign Selected"
     - If the input student record is not the same as any one of the reported "Near Matches/Duplicate" record, click "Create New ID"
     - If you determine that an input record came to this stage by error or can't be resolved, click "Cancel Record".
     - If you can't determine at this time, click "State ID Home" to return to the "State ID" main page to perform another action or exit from the application. This record is still "Waiting to Resolve Near Matches/Duplicates" and you need to revisit this record later and resolve.
       Once you resolved the record, you will be taken to Step 6.
   - If there are no "Near Matches/Duplicates", you will be directly taken to Step 6.
6. Make a note of the confirmation message. If an ID is assigned, the assigned ID Number is displayed. You can make a note of this ID Number and update the same as the "State Student ID" for the student in the local SIS.
7. If you want to download the entered student details with the assigned "State ID", Click "Download State ID" button. System will extract the file and will show you the link to download the same to your local computer.
8. Download the file and verify
   - Through a web browser by double clicking on the link
   - To download the file:
     - Right click on link provided. Select Save Target As . . .
     - Select location to save your download on your computer from the "Save In:" dropdown at the top of the "Save As" screen.
     - Change the download filename in "File name:" box, if you desire.
     - Click "Save".
     - Select "Open" to view and verify the downloaded file or "Close"
9. Select "State ID Home" or "Return to State ID Home" to return to the "State ID" main page.
10. Select another function or press EXIT on "State ID" page.
11. Select EXIT in the Application Menu to log out.
12. Close the Browser

QUICK GUIDE TO SEARCH FOR AN INDIVIDUAL STUDENT ONLINE

1. Login to www.edinfo.state.ia.us (BEDS website)
2. Click "State ID" button
3. Click "Search Individual Student" button
4. In the "Search Individual Student" screen, you can do two types of search.
   4a. To search for a student based on the "State ID", use the top portion of the screen. In the "State ID" field, enter the 10-digit "State ID" of the student and click "Search".
   - If a matching student is found in the "ISN Locator Database", the matching student's information will be displayed in the next screen. If any history information is available in the database, it is shown in the bottom portion. You can see the complete details of a history record by clicking the hyperlink on the "History Date". To return back to the search screen and search for another student click "Select Another".
   - If no matching record is found in the database, the search screen will display the message "No Matches Found".

   4b. To search for a student based on the student details, enter Student Name and Date of Birth at the bottom portion of the search screen and click "Search". At the minimum, you need to enter the student's full "First Name" and "Last Name" to search.
   System will search for the matching records in the ""ISN Locator Database"". This search is done based on probabilistic methods and hence the results will show both the matches as well as the Near Matches with the value of the match probability.
   - If no matches were found it will display "No matches found".
   - If one or more "Near Matches" or "Matches" were found, System will display them in the descending order of match probability at the bottom of the "Search Individual Student" screen. To view the full details of a given matched record, click on hyperlink in either "First Name" or "Last Name".
     - This will show the matching student's information in the next screen. If any history information is available in the database, it is shown in the bottom portion. You can see the complete details of a history record by clicking the hyperlink on the "History Date". To return back to the search screen and search for another student click "Select Another"
5. Click "Clear", reenter another search criteria to continue online search or click "State ID Home" to exit.

Note: The online Search provides the user with student information for only those students for whom the "State ID" is already created and stored in the "ISN Locator Database". Searching for an individual student will not change any details of the student in the "ISN Locator Database". To change district or building number of a student, the student information would need to be entered online through the "Enter Individual Student" function or uploaded in a batch file and processed through the "State ID" System.

Be aware that any search performed in the "State ID" application will create an entry into Usage Analysis tables with the details of search date & time, user login ID, and the search values entered. Unusual or excessive search requests will be investigated.

QUICK GUIDE TO DOWNLOADING OUTPUT BATCH FILES

1. Log into www.edinfo.state.ia.us (BEDS website)
2. Click "State ID" button
3. Click "Extract & Download Batch" button
4. Enter/Select filtering criteria to limit the number of batches displayed
   - "From" Date [batches uploaded from this date only will be considered]
   - "To" Date [batches uploaded up to this date only will be considered]
   - Download Type [only the batches that are currently in the selected processing stage will be considered]. Possible values are:
     i. IDs Assigned – Fully processed batch files ("State ID" assigned)
     ii. Errors To Fix – Batch files that have pending validation errors to be fixed
     iii. "Near Matches/Duplicates to Resolve" - Batch files that have student records waiting to "Resolve Near Matches/Duplicates".
5. Click "Submit". System will display the list of batches that matches the selected filter details
6. Click the "Extract" button of a desired batch, to extract. System will extract a file containing the selected type of records and show a link to the extracted file.
7. Download the file and verify
   - Through a web browser by double clicking on the link
   - To download the file
     o Right click on link provided. Select "Save Target As . . ."
     o Select location to save your download on your computer from the "Save In:" dropdown at the top of the "Save As" screen.
     o Change the download filename in "File name:" box, if you desire.
     o Click "Save".
     o Click "Open" to view and verify the downloaded file or "Close"
8. Select "State ID Home" or "Return to State ID Home" to return to the "State ID" main page.
9. Select another function or press EXIT on "State ID" page.
10. Select EXIT in the Application Menu to log out.
11. Close the Browser